



**REQUEST FOR QUALIFICATIONS**  
**FOR**  
**PROFESSIONAL CONSULTING AND PLANNING SERVICES**  
**IDAHO DEPARTMENT OF LANDS**

**INTRODUCTION**

The Idaho Department of Lands [IDL] is seeking qualified consultants to submit a statement of interest and qualifications demonstrating the ability to perform development suitability, economic analysis, feasibility, environmental inventories, testing and remediation plans, infrastructure development and site redevelopment studies.

Consultants are expected to have an expertise in at least one, if not multiple disciplines that are necessary to perform financial analysis, environmental assessments, development and feasibility studies. IDL's primary goal is to provide long-term, sustainable revenue to the Beneficiary groups that directly benefit from the Endowment assets within the state of Idaho.

IDL hereby requests responses, expressions of interest and statements of qualifications from firms or individuals, with credentials in engineering, surveying, planning, urban design, architecture, economic consulting, financial analysis and environmental planning and remediation services, who are interested in competing in the future for bids to provide professional consulting and planning services for the Idaho State Board of Land Commissioners [Land Board].

**PRE-SUBMITTAL INFORMATION MEETING**

An opportunity will be provided, for interested respondents, to attend an informational meeting about Endowment lands and the role of the Land Board and IDL prior to the submittal deadline for this Request for Qualifications [RFQ].

Presentation items will include:

- What are Endowment lands and how did they come into existence?
- Roles of the Land Board and IDL
- Recent changes in management philosophy
- What does this mean for the future of Endowment lands?

**PRE-SUBMITTAL INFORMATION MEETING**

MONDAY, NOVEMBER 24, 2008

11:00 AM – 12:00 PM, GARNET CONFERENCE ROOM

IDAHO DEPARTMENT OF LANDS

CAPITOL PARK PLAZA BUILDING

300 NORTH 6TH STREET, SUITE 103

BOISE, IDAHO

**REQUESTS FOR CLARIFICATION**

In order to ensure a fair and objective RFQ process and evaluation, all questions and inquiries related to this RFQ shall be addressed in writing by email or facsimile no later than Monday, December 1, 2008 to:

**Kate Langford, Senior Land Use Planner**

Idaho Department of Lands

Email: [klangford@idl.idaho.gov](mailto:klangford@idl.idaho.gov)

Reference RFQ-09-103

Facsimile: 208.334.2339

**OR**

**Tony Pirc, Purchasing/Contract Agent**

Idaho Department of Lands

Email: [tpirc@idl.idaho.gov](mailto:tpirc@idl.idaho.gov)

Reference RFQ-09-103

Facsimile: 208.334.2339

**BACKGROUND**

When Idaho was admitted to the Union as the 43rd state in 1890, it was granted approximately 3,672,000 acres of land for the support of state institutions. The land was granted under the condition that it be managed in perpetuity as a trust for the beneficiary institutions. This mandate was codified in Article IX Section 8 of the Idaho Constitution, which states that the lands are to be managed, "...in such manner as will secure the maximum long term financial return to the institution to which granted." Chief among the beneficiaries are the public schools, which received two sections of every township in the state (1/18 of the total land base). Other institutions include the University of Idaho, the Agricultural College, the Normal Schools, Penitentiary, Charitable Institutions, State Hospital South, School of Science and Public Buildings (now Capitol).

Management activities on state endowment trust land are not intended to benefit the general public, but are directed solely to the good of the beneficiaries of the original land grants. Money generated from the management of these lands is deposited into the earnings reserve fund from which the costs of management and payments to the beneficiaries are made. Revenue from mineral royalties is deposited into the permanent endowment fund. Both the earnings reserve and permanent fund are invested by the Endowment Fund Investment Board. The investment return is distributed to the beneficiaries. Land sale revenue is deposited into the land bank and is available to purchase other land. If not expended for that purpose within five years, the land sale revenue is deposited into the permanent fund.



Management of endowment trust lands is entrusted to the State Board of Land Commissioners. The Idaho Department of Lands is the administrative arm of the Board and carries out the executive directives of the Board to meet the constitutional trust mandate.

The following is an excerpt from the *State Trust Lands Asset Management Plan* adopted by the Idaho State Board of Land Commissioners [Land Board]. This Plan provides the foundation for the Idaho Department of Lands, on behalf of the Land Board, to make management decisions for the Endowment Trust lands within the state of Idaho.

“Endowment assets of the State of Idaho consist of both land and funds. All endowment assets are held in trust by the State in nine endowment trusts. The State initially received grants of over 3.65 million acres of land in trust from the federal government in the Idaho Admissions Bill and through other federal acts. Over time, properties were sold or exchanged, with proceeds from the sales and certain other income deposited in the endowment funds.

The state Constitution establishes the State Board of Land Commissioners (Land Board) as the trustee over the assets of the nine endowments. As trust manager, the Land Board is obligated to manage the assets of each trust with undivided loyalty to the beneficiaries of the trusts. Idaho Code 58-101 created the Idaho Department of Lands (IDL) to serve as the manager of the non-financial assets of each trust on behalf of the Land Board. Similarly, Idaho Code 57-718 created the Endowment Fund Investment Board (EFIB) which formulates policy for, and manages the investment of, the financial assets.

### **Mission**

All endowment assets of the State of Idaho must, per the state Constitution, be managed “in such manner as will secure the maximum long term financial return” to the trust beneficiaries. The assets will be managed to provide a perpetual stream of income to the beneficiaries by:

- Maximizing long-term financial return at a prudent level of risk,
- Protecting future generations’ purchasing power, and
- Providing a relatively stable and predictable payout

### **Asset Management Philosophy**

To fulfill its fiduciary duties to each individual endowment, the State of Idaho will:

- Manage the endowed land and financial assets as a whole trust on a total return basis.
- Seek to optimize risk and return from both the endowments’ land and financial assets through diversification of holdings.
- Ensure that significant land holdings will be maintained in perpetuity, since they provide material diversification and inflation protection to an endowment’s portfolio.



- Seek to reposition parcels to reduce risk, lower management costs and increase prospects for immediate and sustainable income, recognizing that much endowment land remains in the original scattered parcels obtained from the federal government.
- Provide for the appropriate and reasonable management expenses of each endowment from its own income.
- Accommodate public use of endowment lands, to the extent feasible, provided such use does not impair financial returns.

### **Performance Objectives**

- Over time, ensure real returns for each endowment (after inflation and net of management expenses) perform at or above median compared to relevant peers.
- Assets will be grouped into classifications of similar character to facilitate performance monitoring and analyses of portfolio diversification and risk. Each asset class will have a targeted rate of return and is expected to perform at or above median compared to relevant peers.
- Over time, the return of land assets should compete favorably with the return of financial assets. Where determination of land value is problematic, performance will also be measured by discounting expected net cash flows.

### **Protection of Principal**

- Proceeds from the sale of endowment lands will never be distributed, but must be reinvested in land within five years or transferred to the Permanent endowment funds.
- Proceeds from extracted mineral resources will never be distributed but must be deposited to the Permanent endowment funds.
- The principal of the Permanent endowment funds, adjusted for inflation, will never be distributed, to protect the future purchasing power of the beneficiaries.

### **Distributions to Beneficiaries**

- Renewable income from the land assets as well as cash income and capital gains above inflation from the Permanent endowment funds will be deposited in the Earnings Reserve accounts.
- The Earnings Reserve accounts should buffer fluctuations in revenues to provide stable and predictable payouts to the beneficiaries. If an endowment's Earnings Reserve account falls to zero, distributions must stop.
- Long-term spending policy and annual distributions are recommended by the EFIB and approved by the Land Board. The Legislature considers the approved distributions in setting annual appropriations for the beneficiaries. The Legislature also appropriates the operating budgets for the IDL and the EFIB from the Earnings Reserve accounts."



## SCOPE OF SERVICES

IDL desires to proactively evaluate and plan Endowment lands in order to meet the constitutional mandate of the Department. To that end IDL intends to retain professional consultants to provide planning, engineering, environmental assessments, economic analysis and design services in the future. The services that a successful applicant for pre-qualification would provide include, but are not limited to, the ability to perform one or more of the following:

- 1) Economics/Finance
  - a) Market analysis
  - b) Estimate financial returns [operating income/expenditures]
- 2) Environmental
  - a) Environmental Site Assessments, Phase I, II and III
  - b) Risk Assessments
  - c) Brownfields
    - i) Inventory
    - ii) Analysis and remediation plan development
    - iii) Implementation of testing, monitoring and remediation requirements
    - iv) Redevelopment of brownfields sites – federal/state/local programs and requirements
- 3) GIS Systems and Mapping
  - a) Database design
  - b) Database development and data conversion
- 4) Groundwater Engineering
  - a) Well siting studies
  - b) Modeling
  - c) Water quality assessments
- 5) Site Development or Redevelopment
  - a) Feasibility studies
  - b) Site planning
  - c) Renderings
  - d) Conceptual plans
  - e) Cost estimates
  - f) Financing alternatives
  - g) Permitting
- 6) Residential Development
  - a) All site development criteria
  - b) Planning
  - c) Platting – preliminary and final
- 7) Surveying/Mapping
  - a) Boundary survey
  - b) ALTA survey
- 8) Transportation
  - a) Roadway design
  - b) Utilities



- 9) Wastewater
  - a) System design – collection and treatment
  - b) Capacity determination
- 10) Development of “Destination” Locations and Unique Venues
  - a) Resort or recreation related developments in lakeside communities, mountain communities, remote lodges[access via horseback or hiking]
  - b) Mixed use development that would include commercial/residential/employment activities in a more urban setting
- 11) Project Management Services
  - a) Permitting and Approvals
  - b) Project Administration

## SELECTION CRITERIA

Applicants should include documentation for qualifications and experience that **clearly** represent the activities listed in the Scope of Services. Specific responses will be reviewed more carefully than those stressing breadth of experience or general qualifications. Major considerations in pre-qualifying consultants will include:

- 1) Demonstrated firm and staff experience in successfully conducting development suitability, economic analysis, feasibility, environmental inventories, testing and remediation plans, infrastructure development and site redevelopment studies.
- 2) Demonstrated firm and staff experience in environmentally sensitive, compatible site planning and design.
- 3) Proven capabilities for providing creative design solutions within budget constraints.
- 4) Demonstrated experience in creative approaches to designing for sustainability.
- 5) Proven technical, cost and schedule management capabilities.
- 6) Demonstrated ability to provide a number of different services from “in-house” staff or ability to compile a multi-discipline team.
- 7) Proven capabilities for providing response to client/project needs and successfully providing required deliverables within specified timelines.
- 8) Demonstrated experience in successful project planning in unique venues such as resort communities, lakefront and marina development, recreation based development, historic areas, and remote locations.
- 9) Demonstrated firm and staff knowledge and experience with state and local laws and regulatory requirements.

## SUBMITTAL SCHEDULE

Information Packets available	November 17, 2008
Submittals due	December 15, 2008 by 3:00 PM
Notification of Qualifying Consultants	December 31, 2008



## SUBMITTAL PROCEDURES

Firms wishing to be considered for pre-qualification should submit background materials describing their qualifications in accordance with the Submittal format below. Qualifications from interested firms may be delivered or mailed, not later than: Monday, December 15, 2008 at 3:00 PM local time [MDT]

**By Delivery:**

Idaho Department of Lands  
Attention: Tony Pirc [09-103]  
300 North 6th St, Suite 103  
Boise ID 83702-5956

**By Mail:**

Idaho Department of Lands  
Attention: Tony Pirc [09-103]  
PO Box 83720  
Boise ID 83720-0050

## SUBMITTAL FORMAT

Please index all submittals with **TABS** labeled as per BOLD typeface below. Double sided printing is strongly encouraged. Provide five [5] bound copies.

- A. **COVER LETTER** [maximum 1 page]
  - Summarize qualifications most relevant to this project
  - Identify key team members
  - Provide name of contact person, phone, fax and email address
- B. **RELEVANT QUALIFICATIONS** [maximum 4 pages]
  - Offer short, focused paragraphs in a summary format by topic; do not include general information
- C. **RELEVANT EXPERIENCE** [4 to 6 projects, maximum 12 pages]
  - Provide up to four images per project along with brief descriptive text as follows:
    - Briefly state relevance for each image and include an outline of the following information:
      - Project name
      - Beginning/ending dates of project and/or project phases
      - Scope of the program and approximate cost of project
    - Specify the role of the firm [identify if the work was performed exclusively by the firm or a joint venture]
- D. **KEY TEAM MEMBER SUMMARY**
  - Identify key team members of the firm
  - Summarize typical roles and responsibilities for each member on a project team. List experience relative to those typical roles [reference projects listed in Items B and C where relevant]
- E. **FIRM'S BILLING STRUCTURE**
  - Provide an outline of the fee structure for the key team members identified in Item D and associated administrative/technical support fee structure
- F. **REFERENCES** [5-7 names, titles, current mailing and email addresses, and phone numbers]
  - Provide 5 client references relevant to the projects listed in Items B and C
  - Provide a listing of projects, and points of contact, located within Idaho within the last 3 years



## G. APPENDIX [items to be included]

- Firm brochure with background information [if available]
- Key team member resumes

